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Israel

Citrus

Annual

2000

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Report Highlights:
MY 1999 citrus production was estimated at 805,000 mt, of which 259 tmt went for export. The 1999/2000 season was the worst the industry recalls since World War II. The main factors causing the decline of Israel's citrus sector are chronic low profitability due to heavy competition in the European market from Spanish and Moroccan citrus, and a chronic shortage of irrigation water.

MY 2000 production and exports are forecast at the same levels as recorded in MY 1999. If the political unrest of October 2000 continues, picking may be delayed or reduced, affecting both total production and exports.

Includes PSD changes: Yes
Includes Trade Matrix: No
Annual Report
Cairo [EG1], IS

Table of Contents

EXECUTIVE SUMMARY

General Findings

A combination of low market prices in Europe, and revaluation of the US dollar against European currencies, made Israel's MY99 citrus season one of the worst since the Second World War. Losses, as a result of currency problems are estimated at 15 million dollars, eight percent of the 1999/2000 production value of the citrus industry. Continuous low profitability is becoming the sector's main problem after loss of land to urbinization and
the country's chronic water shortage. Production in marketing year (MY)1999 (October 1999 – Septembe.r 2000) totaled 805,000 mt, thirteen percent below the 900 to 950 tmt of ten years ago. The forecast for MY 2000 envisages a repeat of MY1999 production, the result of a combination of improved yields and shrinking total planted area.

The Export Market

MY1999 was characterized by strong competition in European markets from Spanish and Moroccan citrus, mainly oranges and easy peelers. It caused market prices to drop by 7 to 10 percent. This coupled with a strengthening of the dollar vis a vis the European currencies, caused the Israeli growers' FOB price for citrus to fall by 14 percent. The impact of low income was so strong that between July 2000 (the end of the export season, when the economic results are tallied) and October 2000 (the beginning of the current season), 500 hectares of citrus were uprooted. Increased competition in international markets augurs further declines in future farm gate revenues and continued shrinking of the planted area.

Water Shortages

The winter of 1999/00 was the second successive winter with lower than long-term average precipitation. The government has declared a forty percent cut in irrigation quotas for field crops and 20 percent for plantations. Since orchards cannot be partially irrigated, the solution lies in reduction of total planted area. Retention of the current planted area appears possible only if recycled water replaces the dwindling quantities of fresh irrigation water.

In three to five years recycled effluent is expected to be in surplus. The citrus trees can utilize this water easily. The government recognizes the need for help to the citrus industry and offers grants totalling 40 percent of the investment cost of replanting groves and establishing an infrastructure for recycled water utilization. The grant will be given only to those growers who can demonstrate a switch from fresh water to use of recycled water.

Sweeties
Increased quantities of Sweetie from maturing plantings put pressure upon the exporters and their Japanese distributors. Despite intensive promotion efforts in Europe to increase consumption of this sweet green citrus, success is minimal. Japanese customers increased purchases by 12 percent but restricted their purchase to only two sizes, leaving the smaller fruit to the processors or local consumption. Export value of the Sweetie totalled $28.3 million in 1997/8. It dropped to $13.5 in 1998/9, then recovered to $16.4 million in MY1999. For the first time, 10 thousand boxes were shipped to Korea. In MY2000, export to Korea is expected to reach one hundred thousand boxes. The Citrus Marketing Board of Israel (CMBI) anticipates very slow development of the Korean market. This will not solve the problem of Sweetie's rapidly increasing production. While Sweetie export in MY 1999 expanded by 16 percent over that in MY 1998, total yield increased by more than 30 percent. In the near future, when the entire planted area begins to bear, annual production will total 100 tmt. If planted area is not reduced, most of the Sweetie can be expected to find it's way to the processing industry.

In March 1999, an agreement was signed between Israel, Jordan and the Palestinian Authority to cooperate in eradication of the Mediterranean Fruit Fly which mainly harms the citrus industry. Current political tension between Israel and the Palestinians is bound to affect both trade and various areas of economic and technical cooperation. Normally, some twenty thousand metric tons of Israeli fresh citrus are exported annually to the Palestinian Authority and approximately the same amount is imported from Palestinian producers in both Gaza and the West Bank.

Outlook for Fresh Citrus
Physical output is expected to be about 800,000 mt. The political unrest of October 2000 prevents thousands of Palestinian agricultural laborers from reaching their places of employment. If pickers do not turn up and prices in European markets remain low, actual picked quantities and exports may drop lower than the presently forecast 805 tmt and 260 mt respectively.

Processed Citrus
Lack of citrus concentrates in international markets has increased the demand of the processing industry which almost doubled it's price for grapefruit and increased it's orders by almost 20 percent. Thus, grapefruit growers more than doubled their total income from fruit delivered to processors over the previous season and by more than 85 percent over MY 1997.

Outlook for Processed Products
As the total area under citrus is expected to shrink, the processing industry will lack fruit for processing. It is expected that demand will grow for imported citrus products: concentrates and other processing raw materials for industrial use, as well as finished products. The approaching negotiations on the extension of the 1996 U.S.-Israel Agreement on Food and Agriculture may provide an opportunity for the removal of the present barriers to U.S. access to Israel's processed citrus market.

Table 1. Summary of Citrus Production and Disposition: MY 1997 – MY 2000
Thousands of Metric Tons

Species	Market year	Total production	Total exports	Delivery to factory	Fresh consumption
Oranges	1997	394	142	142	110
	1998	268	103	60	105
	1999	327	89	142	96
	2000	300	90	110	100
Grapefruit	1997	303	107	184	12
	1998	283	103	160	20
	1999	259	98	141	20
	2000	260	90	150	20
Easy Peelers	1997	118	47	41	30
	1998	82	29	18	35
	1999	120	35	45	40
	2000	140	50	45	45
Lemons	1997	17	1	1	15
	1998	14		1	13
	1999	18	1	2	15
	2000	20	2	2	16
Sweetie	1997	46	27	18	1
	1998	45	20	24	1
	1999	65	23	39	3
	2000	70	26	40	4
Other	1997	12	10	0	2
	1998	10	9	0	1
	1999	11	8	0	3
	2000	15	10	0	5
Total Citrus	1997	890	334	386	170
	1998	702	264	263	175
	1999	805	*259	369	177
	2000	805	**260	370	175

Source: Based on Annual Summary by Citrus Marketing Board of Israel (CMBI)
(*) Including 20,000 MT export to Palestinian Authority
(**) Including 10,000 MT export to Palestinian Authority. This estimate depends on the accessability of Israeli groves to Palestinian pickers

FRESH CITRUS

Production

MY 1999 Results
Production in marketing year (MY) 1999 (October 1999 - September 2000) was 805 thousand metric tons (tmt), less than 90 percent of the average in the first half of the previous decade and close to one-half the levels experienced in the seventies and the eighties. Israel's citrus sector has suffered low profitability and actual losses in most of the past ten years. The country's chronic water shortages and the cuts in irrigation quotas have teamed up with growing competition from other Mediterranean suppliers to force many growers to face painful decisions as to their economic and prefessional future.

Medium Term Outlook
The export season usually begins at the end of September. By the end of October only Sweetie to Japan has been picked for export. The main reason for delaying the opening of the export season lies in low income from export, due to exchange problems between European currencies, the US dollar and the sheqel. While in October 99, FOB income from one ton of Shamouti stood at $285, now it is $177. This leaves between $50 to $60 per ton at the farm gate, not even enough to cover picking costs. In addition, the political situation since the end of September prevents Palestinian workers from coming to work. Citrus harvesting is based on Palestinian workers.

Ten years ago, annual citrus production exceeded 1.0 million metric tons. In recent years, average production has been in decline and stands now at 800 tmt. Total planted area covers 25,000 hectares, of which 22,000 are bearing. Due to a higher price for grapefruit sent to processing plants, the trend of uprooting grapefruit groves stopped, but uprooting of the Shamouti orange is accelerating. The main limiting production factor in the coming years will be water, followed by the age of the groves. The average age for the main citrus varieties is 30 years, while the average age of the Shamouti exceeds 35 years and it's average yield per hectare is only 40 mt. Average yield in these old plantations, deteriorates steadily and reduces profitability. Under these conditions uprooting is a rational decision.

Table 2. Planted Area by Variety - MY 1999

Variety	Hectares	Share %
Oranges	9,500	37
Grapefruit	8,300	33
Lemons	1,200	5
Easy Peelers	5,800	23
Others	500	2
Total	25,300	100

Source: MOA, Planning Department.

Production Policy
The citrus industry has suffered losses for most of the years of the last decade due either to weather and natural disasters or economic problems. Therefore, at the end of 1998 a governmental committee was appointed by the Minister of Agriculture. In the spring of 1999, when the difficult export situation came to light, another committee was appointed by the Minister of Agriculture. Among the recommendations are:

1. Governmental assistance will be given only where replanting exceeds 0.5 hectare.
2. Forty percent grants will be given only to growers who can prove substitution of recycled water for fresh water.
3. The committee accepted the growers' demand to abolish the consignment system of citrus marketing.
4. The government will propose an insurance scheme to protect growers against currency losses.
5. The committee will assist small grove owners to organize in larger regional organizations in order to improve production and marketing efficiency.
6. The government, together with CMBI will establish an $8.0 million common fund which will grant cultivation loans to orange and easy peeler growers. The interest will be subsidized by the government.

There is a governmental decision to assist the citrus industry in order to preserve it's current size. The Ministry of Agriculture (MOA) together with CMBI are planning to replant 2,000 hectares of old orchards in each of the next five years, all together 10,000 hectares of Shamouti oranges and grapefruit, most of them in central Israel (in the past only plantations in the periphery were encouraged by the MOA). It is expected that the new Shamouti groves will yield 60 mt/hectar. All these replantatings will be based on recycled water. No government assistance will be given to groves which consume fresh water. It is expected that in the medium term, irrigation with regular water will be totally forbidden.

Table 3: Citrus Profitability in MY 97/98 by Species (US$ /packed MT at farm gate)

Species	Yield/HA	Price needed	Price received
Shamouti	40	135	80
Valencia	45	124	75
White Grapefruit	60	97	90
Red Grapefruit	50	110	98
Sweetie	50	110	110
Mineola	44	138	75

Source: Report by CMBI and Citrus Grower Organization.

Consumption
Consumption in the domestic fresh market is difficult to estimate, since direct deliveries to the markets from the growers to wholesalers has become more common in recent years. CMBI sources assume that the local market is growing steadily but is also affected by supply: decreased export in MY 1999 and increased delivery to local markets lowered the retail price and increased consumption slightly. Average annual consumption of fresh citrus stands at 175 tmt.

Approximately 20,000 tons of fresh oranges and easy peelers are exported annually but this is balanced by a similar flow in the opposite direction.

Consumption of the processing industry generally amounts to 40 percent of annual production. It rose in 1999 by 40 percent over 1998 because of improved prices to growers. Higher consumption of fruit for processing in 1999 and in 2000 is a result of shortage of citrus products in international markets. This expanded demand was satisfied in MY1999 by the oranges, grapefruit and easy peelers that were not exported.

Trade

Large quantities of citrus, mainly oranges and easy peelers and non citrus fruit caused strong competition in the European market. Prices dropped to a point where Israeli exports became unprofitable. For the first time since the marketing system was opened to private exporters seven years ago, the exporters also suffered losses although they take the fruit from the growers on consignment. Total export in MY1999, were similar to those in MY 1998 but were 22 percent lower than in MY 1997. Orange exports suffered mostly from the competition in the European markets: orange exports to Europe were 32 percent lower than in MY 1998, which were also exceptionally low because of lack of fruit for export. They were 50 percent lower than in 1997, which was an average year. Demand for Shamouti, Israel's flag ship orange is on a steady decline: from annual exports of 6 million boxes in the past, sales dropped to only 3.4 million boxes. According to the industry, Shamouti, which was very popular in the English market, is losing it’s place on the shelves. Generally speaking, Israeli citrus which had been a leader in European markets, has become insignificant. The problem lies in the following factors:

1. Competition between Israeli exporters harmed their credibility among importers.
2. Unlike in the past when Israeli citrus obtained premiums for it’s high quality, recently, some shipments have been found to be of inferior quality and prices responded accordingly.
3. Israeli R&D failed to develop new successful varieties to compete with Spain's new easy peelers. Israeli varieties are considered obsolete.
4. Israel’s inability to supply citrus under the “Jaffa” label all year round.

Table 4. Fresh Citrus Exports by Main Groups – October 1997 – End of MY1999
Thousand of Boxes

Variety	MY 1999	MY1998	MY1997	% change 1999/1998	% change 1999/1997
Oranges:					
Shamouti	3,426	4,942	6,327	-31	-46
Valencia	993	1,559	2,448	-36	-60
Navels, Trovita	197	251	468	-22	-58
Total Oranges	4,616	6,750	9,243	-32	-50
Grapefruit					
White	1,608	1,900	2,073	-16	-22
Red Blush	33	45	55	-27	-40
Sun Rise	4,493	4,857	5,007	-8	-10
Ray Ruby	33	46	157	-28	-79
Sweetie	1,648	1,426	1,953	+16	-16
Total Grapefruit	7,815	8,274	9,245	-6	-15
Easy Peelers	2,643	2,220	3,877	+19	-32
Lemons	43	29	74	+48	-42
Others	766	742	836	+3	-8
Total	15,883	18,015	23,275	-12	-32

Source: Citrus Marketing Board of Israel.

Prices
Prices in local currencies for exported oranges and easy peelers dropped by 12 percent, while prices for red grapefruit ended slightly higher than in MY1998. White grapefruit ended with a slightly lower price than in the previous year. Together with the strengthening of the US dollar and the Israeli new sheqel, the FOB income in MY1999 for most exported varieties, was 14 percent lower than in the previous year. Income from Sweetie in Japan was 10 percent higher than in 1998. This is a result of a favorable ratio between the Japanese Yen and the US dollar and the fact that the Japanese wholesalers insisted on importing only large fruit for which they were willing to pay better prices than the average over all sizes in MY 1998.

Markets and Market Development
Western Europe's market share, which for many years constituted 70 percent of Israel's citrus exports, is steadily falling and is now only 55 percent. The rest is exported to Japan, Eastern and Central Europe including the FSU. Shifting from the Western European markets is in accordance with the Israeli exporters' desire to avoid the growing competition with Spain and Morocco and to avoid the currency problems they have met in Western Europe. The exporters and CMBI are working on development of new markets, mainly towards Asia and the east. A request for a special budget for new market development activities was presented to the government as part of a general request for assistance to the industry.

Table 5. Citrus Exports to the European Union
MY99 - Metric Tons

Variety	Total Exports	Of which: To EU	% of Variety 99	% of Variety 98
Oranges	68,800	52,224	76	74
Grapefruit				
White	23,400	11,920	51	54
Red	69,600	34,585	50	54
Sweetie	22,600	4,140	18	25
Total Grapefruit	115,600	50,645	50	54
Easy Peelers	35,000	19,030	54	65
Lemons	600	340	57	61
Others	8,500	5,015	59	53
Total	228,500	127,254	56	61

Source: Citrus Marketing Board of Israel.

Table 6: Exports of Fresh Israeli Citrus by Type and Destination
CY 1998 - Thousands of Dollars

Type Destination	Oranges Shamouti	Oranges Valencia	Easy Peelers	Lemons	Grapefruit*	Others	Total
Eu	30,388	11,217	17,162	191	41,167	1,520	101,645
US	253				318	1,551	2,122
Argentina	661		110		3,170		3,941
Other S. America	9				25	6	40
Turkey					64		64
Sweden	5,893	753	515		336		7,497
FSU	3,339	2,073	6,590	62	3,533		15,597
S. Africa	165		261		261		687
Japan					9,751		9,751
Other S. E. Asia	144	246	177	47	887		1,501
Others	631	886	387	57	2,659	97	4,717
Grand Total	41,483	15,175	25,202	357	62,146	3,174	147,537

Source: CBS, Foreign Trade Statistics Annuals.
* Includes Sweetie and Pomello.

Table 7: Exports of Israeli Fresh Citrus by Type and Destination CY99 - Thousands of Dollars

Type Destination	Oranges Shamouti*	Oranges Valencia	Easy Peelers	Lemons	** Grapefruit	Others	Total
Eu	24,480	8,558	14,957	163	37,433	1,147	86,738
US	962		32		61		1,055
Argentina					3,170		3,170
Other S. America	189		60				249
Turkey	103						103
Norway	2,312	192	26				2,530
Sweden	3,925	272	191				4,388
FSU	1,254	177	1,839	36	1,247		4,553
S. Africa	163	47	49		70		329
Japan	2	1,226			12,474		13,702
Other S. E. Asia	341	1,069	298	71	190		1,969
Ukraine	472	50	350		808		1,680
Slovenia	378		55	21	2,211		2,665
Kenia	55	10	7				72
Others	1,881	200	980	5	4,963	70	8,099
Grand Total	3,6517	11,801	18,844	296	59,130	1,217	131,302

Source: CBS, Foreign Trade Statistics Annuals.
* Includes navels ** Includes Sweetie and pomello

PROCESSED CITRUS

Processing Industry

In the recent past, processed quantities reached 500 tmt and 10 processing plants were producing mainly puree, concentrates and juices. In recent years with the decline of total yield, supply to processing plants varies between 300 and 400 tmt. Out of ten plants, only three remain. They each process approximately 80 to 90 tmt, with production value of $125 million of which $80 million is for export. If the fresh citrus industry continues to shrink, the processors are looking for means to ensure their supply of raw material. One possibility presently being pursued is the establishment of processing plants in Spain or Morocco with the intent of shipping concentrates to Israel for final processing.

Citrus Products Trade

Supply of citrus to processing plants in MY98 was more than 30 percent lower than in recent years and in the following marketing year. It affected export and import of citrus products in CY99. Export value fell by 14 percent, but quantity fell even more. Lack of citrus for processing caused increased imports of citrus products: either as final products or as concentrate and other raw material.

Table 8: Exports of Citrus Products by Type and Destination
CY98 - Thousands of Dollars

Desti-nation	Orange Conc.	Grapefruit Conc.	Other Conc.	Grapefruit Segments	Orange Juice	Grapefruit Juice	Other Juice	Other Prods	Total
EU	3,995	1,039	548	11,202	25,541	18,426	1,054	314	62,119
US	6		423	5,581	74		44	144	6,272
Turkey			8		229	36			273
Sweden		22		38	13	40			113
FSU			128	22	1,881	638	88		2,757
Japan		290		585		602			1,477
Other S. E. Asia	71		15		1,352	213	347		1998
Others	200	19	180		2,183	6,231	107		8,920
Grand Total	4,272	1,370	1,302	17,428	31,273	26,186	1,640	458	83,929

Source: CBS, Foreign Trade Statistics Annuals.

Table 9: Exports of Citrus Products by Type and Destination in CY99
CY99 - Thousands of Dollars

Type Destination	**Orange Concent.**	**Grapefruit Concent.**	**Grapefruit Segments**	**Orange Juice**	**Grapefruit Juice**	**Other Products**	**Total**
Eu	4,488	1,034	8,897	13,004	23,867	620	51,910
US		11	3,881			265	4,157
Argentina					1,112		1,112
Other S. America					327		327
Turkey				1,883	239		2,122
Norway					58		58
Sweden			49		42		91
FSU				2,011	1,891	157	4,059
Japan		264	438		1,602	149	2,453
Other S. E. Asia				1,578	578	9	2,165
Ukraine					283		283
Slovenia				234			234
Kenia				74			74
Others	222	135	32	1,423	1,339	59	3,210
Grand Total	4,710	1,444	13,297	20,207	31,338	1,259	72,255

Source: CBS, Foreign Trade Statistics Annuals.

Table 10: Imports of Citrus Products by Type of Product and Source

CY98 - Thousands of Dollars

Origin	Frozen Orange Juice	Frozen Grapefruit Juice	Other Citrus Juice	Total
EU	1,983	153	475	2,611
US and Canada	896	172		1,068
Argentina	504		1,743	2,247
Brazil	173			173
Other S. America	877		1,265	2,142
Turkey		84		84
South Africa	93	677	554	1,324
Others		325		325
Total	4,526	1,411	4,037	9,974

Source: CBS, Foreign Trade Statistics Annuals.

Table 11: Imports of Citrus Products by Type of Product and Source
CY99 - Thousands of Dollars

Origin	Frozen Orange Juice	Frozen Grapefruit Juice	Other Grapefruit Juice	Other Citrus Juice	Total
EU	3,089	455		281	3,825
US and Canada	2,789	4		507	3,300
Argentina		36		21	57
Brazil	586	441		82	1,109
Other S. America	217	364			581
Turkey	2,078	38		345	2,461
South Africa	540	598		15	1,153
Cypros		519			519
Switzerland	530	118		39	687
Others	419	258		3	680
Total	10,248	2,831		1,293	14,372

Source: CBS, Foreign Trade Statistics Annuals.
Note: Imports recorded as being from the EU and from Switzerland in most cases are from Latin America through international brokers in Europe.

Marketing

The main marketing problem of Israel's citrus industry is the competition from Spain and Morocco who take full advantage of their shorter distances to the European markets and Israel's failure to offer "modern varieties". Israel's only advantage over it's competitors - higher quality was also harmed by a variety of agrotechnical problems (see Report IS0003). There is a reconsidering of the decision from seven years ago, to privatize citrus exports instead of exporting only via the CMBI. Some growers feel that competition among the exporters reduces grower revenues. Since the fruit is the same and of the same quality, competition is based on reducing price. Ultimately this harms the grower, and Israel's reputation in the international markets. A reversal of the full privatization of exports has already occured in Italy and in Japan where a single (composite) exporting organization deals with a single organized group of importers. Maintenance of the Jaffa trade mark is an important goal of the CMBI**.** That is the reason why exporters who wish to use it are obliged to maintain high quality standards. . In order to meet European importer's demand to have "Jaffa" citrus throughout the year, CMBI is now considering giving permission to exporters in the southern hemisphere to use the "Jaffa" trade mark in the off-season of Israeli citrus.. Discussions are in progress.

Increasing quantities of Sweetie force exporters and the CMBI to develop new markets, mainly in the Far East (Hong Kong, China and even Australia), since efforts to significantly increase sales in Europe and Japan have failed. After four years of efforts to enter the Korean market, 10 thousand boxes were exported, with hope for increased consumption in the approaching season. In 1999, for the first time, a yellow Sweetie called "Golden Sweet" (it is the same fruit, left on the tree to become yellow) was offered in Europe after it was found that the Europeans identify citrus with yellow or orange colors.

Experimental shipments of "Chandler" (pink grapefruit), White Pomello, Pink Pomello, Sunrise grapefruit, two kinds of easy peelers and lemons were exported to Japan. First reactions were positive, which gives hope for a new market for these Israeli varieties which are new to Japan, and partially helps to reduce the pressure of stiff competition from Spain and Morocco in the European market.

PSD Table						
Country:	Israel					
Commodity: Fresh Citrus - Total						
	Revised	1998	Prelim.	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begins		10/98		10/99		10/00
Area Planted	26830	26830	25800	25340	0	23890
Area Harvested	24850	24850	23400	22900	0	21900
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
Total No. of Trees	0	0	0	0	0	0
Production	690	702	860	805	0	805
Imports	0	15	0	15	0	15
TOTAL SUPPLY	690	717	860	820	0	820
Exports	258	264	330	259	0	260
Fresh Domestic Consumption	170	190	150	192	0	190
Processing	262	263	380	369	0	370
TOTAL DISTRIBUTION	690	712	860	820	0	820

Source: CBS Statistical Abstracts, Foreign Trade Statistics Annuals, Agricultural Statistics Quarterly and unpublished worksheets. Citrus Marketing Board of Israel (CMBI), Citrus Growers Organization (CGO), MOA Committee report.

PSD Table						
Country:	Israel					
Commodity:	Oranges					
		1998		1999		2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Area Planted	10500	10500	9800	9400	0	8000
Area Harvested	9900	9900	9700	9150	0	7960
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	330	268	385	327	0	300
Imports	0	10	5	12	0	5
TOTAL SUPPLY	330	278	390	339	0	305
Exports	110	103	85	89	0	90
Fresh Dom. Consumption	90	115	150	108	0	105
Processing	130	60	155	142	0	110
TOTAL DISTRIBUTION	330	278	390	339	0	305

Source: CBS Statistical Abstracts, Foreign Trade Statistics Annuals, Agricultural Statistics Quarterly and unpublished worksheets. Citrus Marketing Board of Israel (CMBI), Citrus Growers Organization (CGO), MOA Report of the Special Committee on the Citrus Sector, 1999

PSD Table						
Country:					Degrees Brix	
Commodity:	Orange Juice					
		1998		1999		2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Deliv. To Processors	130	60	155	142	0	110
Beginning Stocks	5	5	0	0	1	1
Production	66	31	79	74	0	56
Imports	10	19	15	15	0	30
TOTAL SUPPLY	81	55	94	89	1	87
Exports	57	44	66	62	0	60
Domestic Consumption	24	11	27	26	1	26
Ending Stocks	0	0	1	1	0	1
TOTAL DISTRIBUTION	81	55	94	89	1	87

Source: Based on deliveries to processors as shown in PS and D tables for fresh oranges, and on normative ratios of fresh fruit to single strength juice. Data on exports, domestic consumption and stocks are estimates based on CBS Statistical Abstracts, Foreign Trade Statistics Annuals, Agricultural Statistics Quarterly, conversations held with members of the trade.

PSD Table						
Country:	Israel					
Commodity:	Fresh Grapefruit					
		1998		1999		2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Area Planted	7500	7500	7500	6500	0	5960
Area Harvested	7200	7200	7200	6200	0	5610
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	281	283	305	259	0	260
Imports	0	5	0	5	0	5
TOTAL SUPPLY	281	288	305	264	0	265
Exports	101	103	90	98	0	90
Fresh Dom. Consumption	20	25	25	25	0	25
Processing	160	160	190	141	0	150
TOTAL DISTRIBUTION	281	288	305	264	0	265

Source: CBS Statistical Abstracts, Foreign Trade Statistics Annuals, Agricultural Statistics Quarterly and unpublished worksheets. Citrus Marketing Board of Israel (CMBI), Citrus Growers Organization (CGO), MOA Report of the Special Committee on the Citrus Sector, 1999

PSD Table						
Country:	Israel				Degrees Brix - Single Strength	
Commodity:	Grapefruit Juice					
		1998		1999		2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Deliv. To Processors	160	160	190	141	0	150
Beginning Stocks	1	1	0	0	0	1
Production	81	81	97	73	0	77
Imports	25	25	30	32	0	30
TOTAL SUPPLY	107	107	127	105	0	108
Exports	94	92	110	90	0	90
Domestic Consumption	13	14	15	14	0	17
Ending Stocks	0	1	2	1	0	1
TOTAL DISTRIBUTION	107	107	127	105	0	108

Source: Based on deliveries to processors as shown in PS and D tables for fresh Grapefruit, and on normative ratios of fresh fruit to single strength juice. Data on exports, domestic consumption and stocks are estimates based on CBS Statistical Abstracts, Foreign Trade Statistics Annuals, Agricultural Statistics Quarterly, conversations held with members of the trade.

PSD Table						
Country:	Israel					
Commodity:	Fresh Tangerines					
		1998		1999		2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Area Planted	5700	5700	6350	5640	0	5932
Area Harvested	4100	4100	4400	4640	0	5132
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	82	82	135	120	0	140
Imports	0	0	0	0	0	0
TOTAL SUPPLY	82	82	135	120	0	140
Exports	29	29	35	35	0	50
Fresh Dom. Consumption	35	35	45	40	0	45
Processing	18	18	55	45	0	45
TOTAL DISTRIBUTION	82	82	135	120	0	140

Source: CBS Statistical Abstracts, Foreign Trade Statistics Annuals, Agricultural Statistics Quarterly and unpublished worksheets. Citrus Marketing Board of Israel (CMBI), Citrus Growers Organization (CGO), MOA Report of the Special Committee on the Citrus Sector, 1999

PSD Table						
Country:	Israel					
Commodity:	Fresh Lemons					
		1998		1999		2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Area Planted	1100	1100	1200	1200	0	1515
Area Harvested	1050	1050	1150	1150	0	1420
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	15	14	18	18	0	20
Imports	0	0	0	0	0	0
TOTAL SUPPLY	15	14	18	18	0	20
Exports	1	0	2	1	0	2
Fresh Dom. Consumption	13	13	15	15	0	16
Processing	1	1	1	2	0	2
TOTAL DISTRIBUTION	15	14	18	18	0	20

Source: CBS Statistical Abstracts, Foreign Trade Statistics Annuals, Agricultural Statistics Quarterly and unpublished worksheets. Citrus Marketing Board of Israel (CMBI), Citrus Growers Organization (CGO), MOA Report of the Special Committee on the Citrus Sector, 1999

PSD Table						
Country:	Israel					
Commodity:	Fresh Citrus,Other					
		1998		1999		2000
	Old	New	Old	New	Old	New
Market Year Begin		10/1998		10/1999		10/2000
Area Planted	1700	1700	1400	1650	0	1700
Area Harvested	1270	1270	1200	1250	0	1300
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	6	10	7	11	0	15
Imports	0	0	0	0	0	0
TOTAL SUPPLY	6	10	7	11	0	15
Exports	5	9	5	8	0	10
Fresh Dom. Consumption	1	1	2	3	0	5
Processing	0	0	0	0	0	0
TOTAL DISTRIBUTION	6	10	7	11	0	15

Source: CBS Statistical Abstracts, Foreign Trade Statistics Annuals, Agricultural Statistics Quarterly and unpublished worksheets. Citrus Marketing Board of Israel (CMBI), Citrus Growers Organization (CGO), MOA Report of the Special Committee on the Citrus Sector, 1999